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ABSTRACT

This theme issue newsletter includes five articles on the theme of the coordinated, efficient, and equitable use of funds in educational programming. "A Successful Coordination of Funds and Programs Approach: Four Dimensions of the School Restructuring Process" (Abelardo Villarreal, Oanh H. Maroney) examines the interrelatedness of four dimensions of restructuring (goals, service integration, funding resourcefulness, and accountability) and how this affects school success in coordinating funding to achieve objectives. "Property Tax Relief, Tax Equity and Funding Equalization" (Albert Cortez) suggests that the proposed reduction in Texas property taxes would result in state aid being awarded disproportionately to wealthier school districts, and proposes alternative methods of tax relief. In "Redesigning Federal Programs To Strengthen Schools' Effectiveness" (Gerald N. Tirozzi), the assistant secretary for elementary and secondary education in the U.S. Department of Education comments on the 1994 Improving Americas Schools Act, which encourages integration of federal programs with one another and with state and local programs. "Coordinating Resources for Improved Achievement" (Joseph F. Johnson Jr.) examines new opportunities to coordinate funds and programs, especially for schoolwide programs funded by Title I. "School Finance Reform and Intra-District Equity: An Excerpt" (Jose A. Cardenas) (from the book "Texas School Finance Reform: An IDRA Perspective") suggests that although interdistrict inequities in Texas have diminished, the wide local discretion allowed in expediture of block grants may encourage growth of intradistrict inequities. Unrelated to the issue's theme, "Equal Access to Quality School Facilities" (Roy Johnson) discusses the relationship of student achievement to school environment in light of the deteriorating school facilities attended by many disadvantaged and minority students. Includes IDRA's "Children First" declaration, which deplores the Texas Supreme Court's decision that the state's funding system is "equal enough," and which outlines a more just position on educational finance. (SV)

INTERCULTURAL DEVELOPMENT RESEARCH ASSOCIATION

IDRA Newsletter

ISSN 1069-5672 Volume XXIV, No. 3 March 1997

IDRA Focus:
Coordination of Funds and Programs

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Inside this Issue:

- *Coordinating resources and funds*
- *Federal official discusses programs*
- *Access to quality school facilities*
- *Property tax relief and school finance*
- *An event for early childhood education*

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A Successful Coordination of Funds and Programs Approach:

Four Dimensions of the School Restructuring Process

Abelardo Villarreal, Ph.D. and Oanh H. Maroney

Federal education programs make it possible for local education agencies to continue the promotion of equity and excellence within their service districts. Since the federal contribution to pre-kindergarten through 12th grade education is only a small fraction of the nation's spending on public education, federal program monies are not intended to replace state and local funding (U.S. Department of Education, 1996a). They are intended, rather, to serve as a supplement to those funds.

The U.S. Department of Education's Office of Elementary and Secondary Education has developed numerous programs that grant federal monies to local education agencies serving various student populations. There are 47 such programs that exist under seven areas (U.S. Department of Education, 1996b). These include:

- Education programs for disadvantaged students (11 programs)
- School improvement programs (17 programs)
- Impact aid programs (2 programs)
- Indian education programs (4 programs)
- Migrant education programs (5 programs)
- Safe and drug free schools (4 programs)
- Goals 2000 (4 programs).

There are funding sources within each of the seven areas that many people are familiar with, such as Title I, Title IV and Title VII. However, most local education agencies serve student populations that may qualify them for funding under more than one source, even though all are federal monies. The most effective way to serve the needs of such populations is to coordinate funds from the various federal programs. The general provisions (Title XIV) of the *Improving America's Schools Act* (IASA), also known as the *Elementary and Secondary Education Act* (*ESEA*), promote the coordination of funds as follows:

> While the changes in many of the individual programs in the rest of the ESEA will also provide some flexibility, the crosscutting provisions in Title XIV promote program integration, coordination, equal educational opportunity, flexibility, state and local discretion, efficiency, and improve accountability (U.S. Department of Education, 1994b).

Furthermore, the IASA specifically promotes the coordination of funds within local education agencies that serve language-minority and limited-English-proficient (LEP) students as follows:

> In order to secure the most flexible and efficient use of federal funds, any state receiving funds under this subpart [Bilingual Education Capacity and Demonstration Grants, subpart 1, sec. 7121] shall coordinate its program with other programs under this act, the *Goals 2000: Educate America Act*, and other acts, as appropriate, in accordance with section 14306 (U.S. Department of Education, 1994a).

In fiscal year 1996, the federal government designated approximately $47 billion in on-budget funds for programs administered by the Department of Education (National Center for Education Statistics, 1996). This is an increase of almost $1 billion from the 1995 fiscal year's funding of $46.1 billion. The distributions and estimated amounts are listed in the table

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cover photo by Tony Gonzalez

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below.

Of the estimated $7.3 billion designated for elementary and secondary education in fiscal year 1996, approximately $6 billion was funded for grants for disadvantaged students, $1 billion was funded for school improvement programs, $155 million was funded for bilingual education and $62 million was funded for American Indian education (National Center for Education Statistics, 1996).

The purpose of this article is to provide a rationale for the need to combine and coordinate funds and to define how the interrelatedness of four dimensions of the restructuring process affects the success that schools have in coordinating funding to achieve their purpose and goals.

Context

Researcher O'Neil states that the essence of school restructuring consists of a deliberate attempt by the schools to combine and coordinate the different aspects (principle, leadership and group processes) associated with restructuring to achieve a purpose shared by everyone in the organization (1990). *Restructuring* is used synonymously with terms such as *reorganization*, *collaboration*, *coordination*, *synergism* and *accountability*.

The focus is on the school's ability to combine and coordinate resources to achieve its goals. Just as it is critical that administrators and teachers have a clear understanding of the essential factors that affect student achievement, it is also significant that they see the relationships that exist among curriculum, instruction, accountability, staff development, staff commitment and funding. How to orchestrate these factors in a manner that produces high achievement results in an economically efficient way is a source of great dilemma for many of our schools.

School restructuring calls for rethinking how schools target and allocate available funding. No longer is it the decision of one administrator. No longer is funding used to leverage acquiescence or involvement. The successful allocation and coordination of funds depends on the alignment of goals, delivery of educational services and accountability systems. This article discusses four dimensions of the school restructuring process that have a high degree of interrelatedness.

Relationship of Four Dimensions of the Restructuring Process

Sound organizational theory embraces four dimensions of the restructuring process that are critical to efficient coordination of funds. The box on page 13 graphically shows the interrelatedness of these four dimensions.

The first dimension, ***goal statement,***

Successful Coordination *- continued on page 13*

FEDERAL ON-BUDGET FUNDS DESIGNATED FOR PROGRAMS ADMINISTERED BY THE U.S. DEPARTMENT OF EDUCATION

FISCAL YEAR 1996

Type of Funding	Amount (in millions)
Elementary and secondary education	$7,275
School assistance in federal affected areas	$742
Vocational and adult education	$1,223
Education for handicapped students	$5,879
Post-secondary student financial assistance	$30,041
Direct aid to post-secondary institutions	$773
Higher education facilities	$30
Other higher education facilities	$4
Public library services	$125
Payments to special institutions	$291
Departmental accounts	$667
Total (estimated)	**$47,050**

Source: National Center for Education Statistics. *The Digest of Education Statistics 1996*. Table 358.

PROPERTY TAX RELIEF, TAX EQUITY AND FUNDING EQUALIZATION

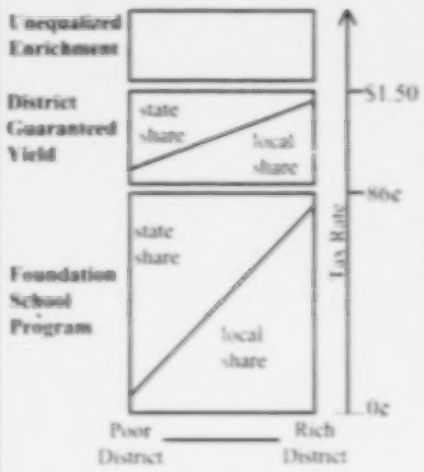
Albert Cortez, Ph.D.

In January, the governor of Texas announced his long awaited program to reduce property taxes in Texas. As described in materials distributed by the governor's office, the plan includes an increase in the homestead exemption (the portion of the value of a home that can be exempted from local school property taxes) from the current level of $5,000 to $25,000. The plan exempts business inventories from local school taxes and reduces tax rates by 20 cents in all school districts.

On the surface the proposals sound very appealing to taxpayers. However, people who are also concerned with improving the quality of education overall and improving equity in the state's public school funding system are cautioned to look at the proposed plan with a very critical eye.

Lost so far in the public discussion of the governor's plan is a comparison of educational spending levels in Texas and other states in the country. According to the National Center for Education Statistics, Texas ranked 28 among the 50 states in average spending per pupil in 1993-94 (Clark, Praskac and Walker, 1995). Before rushing into some strategy that purports to reduce taxes, policy-makers should consider the quality of public schooling available to local communities and whether or not that quality is commensurate with what is needed to ensure access to equitably funded, excellent schools for all Texas students. While the state's ranking has improved in the two years since that 1993-94 data was compiled, it is safe to assume that Texas ranks somewhere in the middle at best, while many comparable states rank in the top quarter of expenditures per pupil.

TEXAS' THREE-TIER SCHOOL FINANCE SYSTEM



The third tier allows districts to raise funds for pre-existing facilities debt. This tier is not equalized.

The second tier allows individual districts to raise additional funds based on extra individual tax effort.

The bottom tier uses the property tax base of the whole district as the measure of property wealth to determine state aid. The state supplements what local district raises.

Effect on Equalization

While a look at the state's standing relative to the rest of the nation is useful, we should also consider the extent of equity in the funding system in Texas. Data presented in the *Edgewood* school finance court hearings showed that, even under a best-case scenario assuming the state would fully fund equalization formulas, a gap of $600 per pupil would be maintained between the state's poorest and wealthiest school systems. So far, the state funding system has not received anything near the full funding level proposed in the *Edgewood* hearings and used by the Texas Supreme Court to justify its position that the Texas system can now be considered acceptable.

In the 1996-97 school year, the Texas funding plan guarantees that each school district will have $21 for each cent of school tax rate (up to 64 cents per $100 of property value). More than 90 school districts can generate more than the equalized level of $21 because they have wealthier tax bases.

For example, a school district with a tax base of $280,000 can get $28 for each one cent of tax effort, meaning it gets $5.50 more per student for each penny of property taxes. Multiplying that $5.50 times the maximum of 64 cents that are "equalized"

Property Tax Relief - continued on page 5

COST OF TEXAS GOVERNOR'S PROPOSAL TO CUT SCHOOL TEXAS

Governor's Proposal Section	Proposal	Cost for 1998-99 Biennium
Taxable value of homestead	Eliminate first $25,000 of value of residence from school property taxes	$897 million
Local school property tax rates	Require districts to cut school taxes by 20 cents (state will reimburse from its revenue sources)	$1.17 billion
Business inventory taxes	Exclude inventory from local property tax base	$859 million

Source: Legislative Budget Board

DECLARATION: CHILDREN FIRST

In January of 1995, to the dismay of poor school districts in Texas and of education advocacy groups, the Texas Supreme Court handed down a decision that all but ended 25 years of a long-standing fight to achieve funding equity in Texas. The court upheld Senate Bill 7 as constitutional under the Texas Constitution and in effect declared that the state's funding system is equal enough. In response, IDRA released a declaration, "Children First," along with the support of more than 70 individuals and organizations. Today, school funding is making headlines as the Texas governor and legislature debate alternative property tax proposals and related measures. The declaration reprinted below outlines our commitment to the creation of a truly equitable funding system.

On January 30, 1995, the Texas Supreme Court issued a long-awaited ruling on the *Edgewood vs. Meno* school funding case. In its ruling, the court stated that "it is apparent from the court's opinions that we have recognized that an efficient system (of public education) does not require equality of access to revenue at all levels...The state's duty to provide [school] districts with substantially equal access to revenue applies only to the provision of funding for a general diffusion of knowledge...As long as efficiency is maintained [with efficiency defined as supporting a minimum or basic program] it is not unconstitutional for districts to supplement their program with local funds, even if such funds are unmatched [not equalized] by the state..."

Advocates for equitable educational opportunities for children are appalled by the Texas Supreme Court's view of the issues presented and respectfully disagree with their position. As eloquently summarized by Justice Spector in her dissenting opinion:

> This case is about a court that has come full circle. Just six years ago, faced with gross inequities in the school financing system, we unanimously decided that every school district must have similar revenues for similar tax effort. Today's cobbled-together opinion rejects that mandate, and instead sanctions dissimilar revenues for similar tax effort. This holding is not based on any matters tried in the district court. Instead, it is based on the *previously rejected* premise that the state's constitutional responsibility is satisfied by providing most school children with the very least, and the favored few with the best that money can buy. Because I believe this doctrine has no place in the field of public education, nor in the jurisprudence of this case, I dissent.

While recognizing that the Texas Supreme Court has the prerogative of issuing legal opinions, it is the prerogative of free citizens to voice their own opinions concerning the acts of political bodies and the soundness of their actions and decisions. Our perspectives on the issue include the following:

- Education is a state responsibility according to Article VII of the Texas Constitution: "It shall be the duty of the legislature to make suitable provisions for the support and maintenance of an efficient system of public schools." We believe that responsibility includes ensuring access to equitable funding for *all* students attending Texas public schools.
- Our opposition to the court's ruling stems from clear evidence that there remain vast differences in district property wealth and an understanding that these differences will perpetuate gross inequalities in the school taxes and the money available to educate students in property rich and property poor communities;
- We believe that the Texas Supreme Court erred in limiting state responsibility to the provision of an equalized *inferior* education for all students. In her dissenting opinion, Justice Spector stated that the system sanctioned by the decision will allow wealthy districts to expend $6,146 while the poorest districts will have access to only $3,608 at identical tax efforts, amounting to a difference of $50,760 per classroom; and
- We disagree with the court's proposition that unequal taxes for Texas citizens are legally acceptable. According to the record, the state's wealthiest school districts can tax themselves at $1.22 to fund a "basic" educational program while the state's poorest districts must tax themselves at a rate of $1.31 for the same result, a tax disparity of 9 cents.

In contrast to the Texas Supreme Court, we believe that:

- As the district court noted, *all* children are the state's children and thus should have equitable access to educational opportunities;
- The demands of the workplace and skills needed to be full and productive citizens require access to more than a minimum education;
- Justice is not served when the court endorses the concept of superior education for some citizens while relegating others to a so-called "equalized" inferior one, even when the commissioner of education testifies that "our present accreditation criteria at the acceptable level...does not match up with what the real world requirements are"; and
- Since local districts are required to provide grounds, buildings, furniture and equipment and since districts are currently required to bear this burden totally on their own, and since the ability to shoulder the load is entirely dependent upon unequal district property tax bases, the legislature has a moral and legal obligation to equitably fund school facilities.

For these reasons we hereby declare that we reject the high court's judgment and remain committed to working for the creation of a truly equitable funding system that provides equitable and high quality educational opportunities for *all Texas students*; one which provides all our citizens with the skills required for them to be full and productive members of our society. We do concur with the majority opinions' closing comment that despite their ruling, *Texas can and must do better*. Justice and morality require it, and our economic survival as a state demands it.

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Endorsers of IDRA's "Children First" Declaration

Organizations and individuals who endorsed the "Children First" declaration agreeing that children are first in our consideration of equalizing our schools include:

Alamo Reading Council
American Civil Liberties Union – San Antonio Chapter
Asociacion Latino Americana de Salud [Mental] (ALAS)
AVANCE
Broaddus Independent School District
Canutillo Independent School District
Carver Community Cultural Center
Corporate Fund for Children
Dickinson Independent School District
Equity Center
Fabens Independent School District
Hispanic Association of Colleges and Universities (HACU)
Intercultural Development Research Association (IDRA)
Kenedy Independent School District
Latin American Research and Service Agency
Lawyers' Committee for Civil Rights Under Law of Texas – Immigrant and Refugee Rights Project
League of United Latin America Citizens (LULAC)
Mexican American Legal Defense and Education Fund (MALDEF)
NAACP – San Antonio Branch
National Council of La Raza
National Latino Children's Agenda
San Antonio Area Association for Bilingual Education
Southwest Voter Registration Education Project (SVREP)
Texas Association for Bilingual Education
Texas Federation of Teachers

Jerry Abeyta
William Acosta, MSW/ACSW, JD
Erasmo Andrade
Sally Andrade
Palmira A. Arellano
Gloria Bahamon
Phil Barefield
Lydia Camarillo
Virginia D. Cantú
Diana L. Carbajal
Joe Casias
Rosemary Catacalos
Carmen Cortez
Dorcas I. De Soto
Alfredo R. Flores
Dan Hamric
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Tomás Thomas
Eddie Torres
Ricardo Torres
Rolando Gonzales Teviño
Mildred Utley
Carol E. White
D.E. Zatarain
Leo Zuñiga

For a copy of the "Children First" declaration, contact IDRA at 210/684-8180 or idra@idra.org.

Though it may seem fair on the surface, the 20 cent "property tax relief" proposal would really give the greatest amount of state funding to school districts that already have the greatest property wealth.

Property Tax Relief - continued from page 3

by the state increases the gap by an additional $352. Adding the $600 of unequalized enrichment and the $352 gap reveals a disparity of $952 per pupil. That is, two districts with an identical tax rate of $1.50 would have a difference of $952 per pupil because the state does not equalize the current state-supported educational program.

The proposed local school property tax reduction calls for a mandated uniform reduction of 20 cents statewide. Under this plan, a school system with a local property tax base of $280,000 per pupil would receive $560 (0.0020 x $280,000) in state funding to replace the local revenue it would have raised without the tax reduction. A property poor school district with a local tax base of $28,000 per pupil would receive only $61 in state funding since this is the total amount of local tax revenue that would have been raised without the tax reduction.

We see in this example the effect of providing state aid in a manner that ignores local district tax bases and existing tax efforts. Though it may seem fair on the surface, the 20 cent "property tax relief" proposal would really give the greatest amount of state funding to school districts that already have the greatest property wealth.

Some people argue that this inequity is all right because high wealth districts raise the most local tax money as a result of their larger tax bases. But this approach would use millions of dollars of state money to maintain an unequal education system. The chart on Page 3 summarizes the estimated cost to schools under the segment of the governor's plan that mandates local school tax reductions.

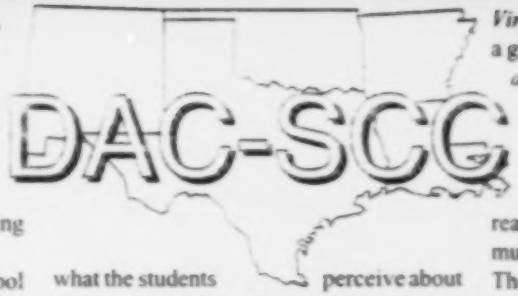
A second concern with providing tax relief in inverse proportion to local wealth is that this short-term relief will create a "reserve" potential or "tax cushion" in

Property Tax Relief - continued on page 16

Equal Access to Quality School Facilities

Roy Johnson, M. A.

In our nation's schools today, teachers and students find themselves daily in environments that adversely affect their morale and their performance. Poor and minority students in particular find themselves in school facilities that are in desperate need of repair, yet they are expected to achieve high and challenging standards.



The American Association of School Administrators recently found that 74 percent of U.S. school facilities should be "replaced or repaired immediately" and another 12 percent are "inadequate places of learning" (Hansen, 1992). Far too often, even within school districts, poor and minority students from "the other side of the tracks," rural areas and inner-city urban areas find themselves in less desirable school facilities than their counterparts. All students need access to quality facilities that are conducive to learning and optimize opportunities for student success.

Researcher Edmonds and others have cited a number of broadly accepted characteristics of effective schools (1979). Edmonds cites six major characteristics that lead to academic success for poor and minority students. In fact, these characteristics are widely accepted as prerequisites for academic success for any student group. These effective school characteristics include the following:

- strong administrative leadership;
- a climate of expectation (among teachers and administrators) that all children can and will succeed;
- orderly school atmosphere (climate);
- primary emphasis on student acquisition of basic skills;
- school energy and resources focused on basic skills; and
- frequent monitoring and feedback on pupil progress.

Researchers Purkey and Smith further suggest that *school climate* means the maintenance of an "orderly, safe environment conducive to teaching and learning" (1983). An orderly, safe and disciplined environment is imperative to maximize teaching and learning, and reflects the seriousness and purpose with which the school approaches the task of educating children and youth.

Students' perceptions of their physical environment provide a gauge to measure what the students perceive about the quality of the education provided to them. It has been nearly 43 years since the "separate but equal" doctrine was ruled unconstitutional in 1954 by the U.S. Supreme Court in *Brown vs. Topeka Board of Education*. Prior to this landmark case, some people felt that minority students should be provided "separate but equal school facilities," but few would agree that these facilities were truly equal. Despite the prevalent view that facilities should be separate but equal, minority and poor students often attended schools with facilities in need of major repair, or they attended school facilities of lesser quality than their White or wealthier counterparts, particularly in southern states and rural areas within states.

School desegregation efforts in the mid 1950s through the 1970s focused on the physical desegregation of minority and majority students (Scott, 1995). The quality education components of most school desegregation plans focus on providing additional education services and improved conditions for minority students. Desegregation is defined here in the simplest sense as the assignment of students to schools and within schools without regard to race, sex and national origin.

Physical access to school facilities is mandated by a number of federal statutes and court rulings. For example, Section 504 of the *Rehabilitation Act of 1973* prohibits discrimination against students on the basis of handicapping conditions. It requires that:

> No qualified handicapped person shall, on the basis of handicap, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity which receives or benefits from federal financial assistance...

Court rulings about school desegregation also apply. In *Green County vs. School Board of New Kent County, Virginia*, the U.S. Supreme Court stated that a given district is "clearly charged with the *affirmative duty* to take whatever steps might be necessary to convert to a unitary system in which racial discrimination would be eliminated *root and branch*." This decision is important for another reason beyond the fact that school boards must *actively work* toward desegregation. The court stated that, when reviewing the facts, "the racial identification of the system's schools was complete, extending not just to the composition of student bodies..., but to *every facet of school operation* – faculty, staff, transportation, extracurricular activities and facilities." These factors, including racial composition of the student body in schools have come to be known as the *Green Factors*. Since 1968, these six factors have been used by the federal courts as a basis for determining the degree to which equal educational opportunity and "unitariness" exists in a district under review by the court (IDRA, 1996).

Below are some recommendations regarding the evaluation of student access to quality facilities.

- State and federal mandates for educational programs and environmental safety must include provisions for financial assistance to local school systems.
- Local school systems must conduct detailed evaluations of school facilities and develop long-range facility improvement and replacement plans. [The establishment of a facility planning and management office (or officer) would facilitate the conduct of the facility needs assessment and the development of the improvement plans.]
- State education agencies must provide assistance to local school systems in the collection of data on facilities and in the development of facility improvement plans.
- Local school systems must do a better job of communicating the need to improve school facilities to parents and the community in bond elections.
- Local school systems must ensure that minority and poor students have equal access to quality school facilities that are conducive to learning.

Equal Access- continued on page 7

Equal Access- continued from page 6

Condition of School Facilities

According to a U.S. General Accounting Office survey, about 60 percent of the nation's 80,000 elementary and secondary schools are at some level of disrepair. The GAO estimates that $122 billion is needed to repair or upgrade the country's school facilities to good overall condition (Robledo Montecel, 1996).

Since many school systems elected to postpone repairs or delay the construction of new facilities during periods of financial hardship, the condition of school facilities is deteriorating rapidly.

Local school systems are generally responsible for building and maintaining school facilities. Some school systems have found it increasingly difficult to pass bond elections to fund repairs and new construction. They are currently seeking innovative and grassroots strategies to make the issue of bond elections more plausible to the people in their communities. The consequences of deferring maintenance and construction include premature building deterioration, indoor air problems, increased repair and maintenance costs, and reduced operating efficiency of equipment (Frazier, 1993).

When the school conditions improved from poor to excellent, the average standardized achievement scores increased by 10.9 percentage points.

Dr. Maria Robledo Montecel, executive director of IDRA, testified recently before the President's Advisory Commission on Educational Excellence for Hispanic Americans, stating:

> Let us not be lulled into an argument of merely bricks and mortar. We are talking about the molding of the future of massive populations of children who are ready to learn, but because of bureaucracy and politics, the schools are not ready for them (1996).

Physical Environment and Student Learning

People are influenced and affected by their environment. Linda Frazier aptly states:

> In many American schools, students and teachers find themselves in a physical environment that adversely affects their morale, and in some cases, their health. Although hard evidence is scanty, a few studies also indicate that when a school building is in despair, students' achievement suffers (1993).

Many poor and minority students cope daily with school facilities with peeling paint, crumbling plaster, overflowing or malfunctioning toilets, poor lighting, poor ventilation, and malfunctioning or non-existent cooling and heating systems. These conditions affect the health and morale of both the students and their teachers.

Though few studies exist that establish a clear and direct relationship between student achievement and the quality of school facilities, common sense tells us that students in newer and better maintained school facilities are apt to have access to the necessary equipment, teaching staff and environment conducive to learning. One study in the Washington, D.C., school system tested the hypothesis that there is a correlation between student achievement and the condition of the school building. In this study after controlling for other variables, Edwards found that students' standardized achievement scores rose by an average of 5.45 percentage points as the ratings of school conditions improved from poor to fair (1991). When the school conditions improved from poor to excellent, the average standardized achievement scores increased by 10.9 percentage points.

In another study, the Saginaw public schools initiated a five-year project in 31 of its schools. Using a school improvement survey, school staff at each school building were surveyed, and the results were used to identify and solve problems that affected school learning (Claus and Girrbach, 1985). Reading and mathematics achievement improved as schools attained higher percentages of their school improvement goals.

The issue of deteriorating school facilities must not be delayed any further. More delays will only result in increased costs and limited student achievement. The interrelated concepts of adequacy and equity must also be addressed. *Adequacy* deals with the sufficiency of the school facilities to carry out the expectations of quality education as it pertains to teaching and learning. *Equity* refers to the access of students and teachers to quality school facilities that are conducive to teaching and learning. The bottom line is whether or not poor and minority students have comparable school facilities that are capable of providing a modern, quality education.

Resources

Claus, Richard N., and Charmaine J. Girrbach. "An Assessment of the Saginaw Successful Schools Project: A Look at the Data." Paper presented at the Joint Meeting of the Evaluation Research Society and the Evaluation Network. (Toronto, Canada, October 17-19, 1985).

Edmonds, R. "Effective Schools for the Urban Poor." *Educational Leadership* (1979), pgs. 37, 57-62.

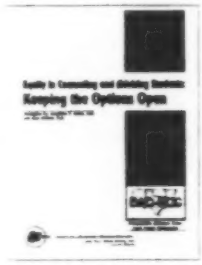
Edwards, Maureen M. "Building Conditions, Parental Involvement, and Student Achievement in the D.C. Public School System." Masters Thesis.

Equal Access- continued on page 10

Desegregation Assistance Module Available

Equity in Counseling and Advising Students: Keeping the Options Open

by Josephine F. Garza, M.A., and Alva E. McNeal, M.A.



This training module is designed for trainers to assist classroom teachers and school administrators and provides cross-cultural counseling practices that can be used when working with culturally diverse populations. Use this tool to help participants become familiar with counseling roles that promote equity in a multicultural society. Participants can also review strategies for cross-cultural counseling by applying them to situations that will maximize effectiveness when working with culturally diverse populations. This 42-page module comes with session outlines, a pre/post test, and handout and transparency masters (ISBN 1-878550-40-3; 1997 Second Edition; $8.50).

Available from IDRA at 5835 Callaghan Road, Suite 350, San Antonio, Texas 78228-1190; 210/684-8180; fax 210/684-5389; E-mail: idra@idra.org.

REFLECTIONS

Dr. Gerald N. Tirozzi

REDESIGNING FEDERAL PROGRAMS TO STRENGTHEN SCHOOLS' EFFECTIVENESS

As the assistant secretary for the U.S. Department of Education's Office of Elementary and Secondary Education, I oversee the administration of almost $10 billion annually for federal education programs. It is my strong personal belief that our nation's social and economic future, and its moral fiber, are inextricably linked to our ability to educate all children at high levels. Therefore the question of *how* we administer federal funds is crucial.

The Department of Education, under the strong leadership of Secretary of Education Richard W. Riley, has made great strides in redesigning federal education programs to be more efficient, effective and flexible. Recent changes in past education legislation have promoted a new era of education reform, and the federal government now works in partnership with state and local education agencies. For 30 years, the *Elementary and Secondary Education Act* (ESEA) has provided federal assistance to schools, communities and children in need. Established in 1965 as part of President Johnson's "War on Poverty" and now operating at funding level of about $11 billion annually, ESEA continues to be the single largest source of federal aid to kindergarten through 12th grade schools.

Thirty years of sustained federal commitment under the ESEA has indeed changed the face of U.S. education. Title I has helped raise the academic achievement of millions of disadvantaged children, particularly in basic skills. The Safe and Drug-Free Schools program has increased public awareness about the role of schools in curbing violence and combating illegal drug use. Most schools now have curricula and policies to prevent violence and drug abuse. The Title II Eisenhower Professional Development program has familiarized thousands of classroom teachers with new knowledge and instructional techniques in mathematics, science and other critical subjects. Title VII Bilingual Education has helped generations of children with limited English proficiency learn English and succeed in school. Other ESEA programs have yielded a host of benefits for students, teachers and parents that would have been difficult to realize without federal support.

Consistent with their categorical nature and equity focus, ESEA programs have concentrated mainly on assisting specific groups of children and accomplishing special objectives, rather than focusing on addressing the general education program in local schools. At times, however, this categorical approach has unintentionally resulted in federally funded programs operating in isolation from one another and in services being delivered apart from the regular instructional program of the school – even in spite of recent endeavors to change perceptions and practices.

The 1994 passage of the *Improving America's Schools Act* (IASA) signaled a new era for ESEA. This revised ESEA emphasizes high expectations for all children, a schoolwide focus for improvement efforts and stronger partnerships among schools, parents and communities. The revised ESEA also calls upon states and communities to integrate federal programs with each other and with state and local programs, while keeping many of the law's special emphases and its focus on children considered to be at-risk. Program integration is emphasized not for its own sake, but because integrated programs have a better chance of raising achievement for all students, particularly children considered to be at-risk. When federal, state and local programs are working toward the same goals, they create a synergy that can produce greater results for students than programs operating in isolation. Other possible benefits of integration are improved efficiency and lower administrative costs.

The law contains a number of strategies that make it easier for states and communities to plan programs around a common vision and integrate them with each other: Schoolwide Programs, a key amendment, make it possible for more high-poverty schools to operate schoolwide programs. Under prior law, schools could conduct schoolwide programs only if at least 75 percent of the children enrolled in the school or residing in the attendance area came from low-income families. The IASA lowered the poverty threshold for schoolwide eligibility to 60 percent for school year 1995-96 and to 50 percent for subsequent years, making an additional 12,000 schools eligible to operate schoolwide programs. Currently, there are about 8,500 schoolwide programs, an 87 percent increase from 1994-95.

Buildings with schoolwide programs can use their Title I funds – as well as the vast majority of their other federal education funds and their state and local funding – to benefit all children in the school. They do not have to document separately the use of federal funds, as long as their activities upgrade the school's overall education program and meet the intent and purposes of each of the federal programs included. A school with a schoolwide program must conduct a needs assessment of the entire school. The school also must develop a comprehensive schoolwide plan that incorporates components of the schoolwide program and that describes how the school will use federal, state and local resources to implement these components. The comprehensive plan can be an excellent tool for encouraging educators to design programs around the needs of their students rather than administrative demands.

The revised ESEA permits states to develop a single consolidated plan covering several ESEA programs and federal vocational education grants, instead of separate plans for each program. So far, 49 states have submitted consolidated plans to the U.S. Department

Redesigning *- continued on page 9*

REMEMBER, BOYS AND GIRLS... WITH AN EDUCATION, YOUR DREAMS AND OPPORTUNITIES ARE AS LIMITLESS AS THE HORIZON!...
FUNDS CUTOFF
TEXAS PUBLIC SCHOOLS
BRANCH

Reprinted with permission from the artist John Branch, *San Antonio Express-News*

Redesigning *- continued from page 8*

of Education. The plans describe each state's general goals for all students and its strategies for designing and integrating ESEA programs to further these goals. Although consolidated planning does not relieve states of federal program requirements, it does enable them to plan how to use all of their federal funds to support overall state goals. A similar ESEA provision allows local educational agencies to submit a single consolidated plan to their states.

The law also permits states to consolidate funds for state administration received under various ESEA programs and *Goals 2000*, as long as the majority of their administrative resources comes from non-federal sources. A similar provision authorizes local educational agencies, with state approval, to consolidate their local administrative funds from ESEA programs. These provisions make cross-program planning much easier.

Working in tandem with IASA is the *Goals 2000: Educate America Act*. Both pieces of legislation have distinct but connected roles to play in supporting school improvement. *Goals 2000* can help states and school districts lay the foundations of reform: establishing state and local content and performance standards, designing a system of assessments and accountability to determine whether or not children are reaching the standards, planning how to use and coordinate available resources, and developing strategies to actively involve parents, teachers and community members in school reform.

While both the re-authorized ESEA and *Goals 2000* contribute to the bottom-line goal of increased learning for all students, the greatest potential for systemic reform ultimately comes from using *all* fiscal resources in an integrated, coordinated way. As a former education commissioner, superintendent, principal and teacher, I know firsthand the value and power of using such resources in an integrated manner. States and school districts today have unprecedented flexibility when using federal education dollars to promote comprehensive school reform. Both *Goals 2000* and ESEA ask states and communities to start with their own visions of educational success, then identify the programs that will make it possible to achieve that vision – rather than starting with program requirements and working backwards.

Looking at the needs of the whole school and the whole student is a more sensible and educationally sound approach than designing instruction solely to fit the parameters of funded programs. I am proud to be involved in the department's ongoing efforts to give state and local education agencies the power and authority to make positive changes in their schools and communities.

Dr. Gerald N. Tirozzi is the assistant secretary for elementary and secondary education in the U.S. Department of Education. He has worked in education for 23 years to improve teaching and learning for all young people. This includes his service as a professor at the University of Connecticut, as Connecticut's commissioner of education, as president of Wheelock College in Boston, as superintendent of the New Haven school system, as a principal and as a science teacher.

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Coordinating Resources for Improved Achievement

Joseph F. Johnson, Jr., Ph.D.

A teacher sighs in frustration as another group of students leaves for an assortment of pull-out sessions. She wonders, When I am going to have time to ensure that they are learning necessary skills and concepts?

A principal and several teacher leaders are excited because they have identified the professional development program that will most likely support their school in making dramatic strides toward greater student achievement. Then someone asks, "How will we manage to pay for this?" The mood of the group dampens as they acknowledge that their Title II funds are inadequate to cover the cost of the program.

A parent receives a letter from the district's Title I coordinator. The letter asks him to participate in a planning meeting on Monday. He has also received a request to help plan the new Title VII proposal on Tuesday. The parent wonders, Why are these meetings separate? Will one meeting relate to the other?

In July of 1995, the *Improving America's Schools Act* became law. This federal legislation provides new opportunities for schools, school districts and states to coordinate education programs in ways that lead to less duplication of services, less fragmentation of efforts and greater focus on improving student achievement. Scenarios such as those listed above should become increasingly rare as educators become aware of the new opportunities to coordinate funds and programs.

Many of the opportunities for increased coordination are provided for schools that become Title I schoolwide programs. In general, these are Title I schools where 50 percent or more of the students meet free or reduced-price lunch criteria. These schools must engage in an extensive planning process to become schoolwide programs. As schoolwide programs they have tremendous opportunity to combine and coordinate funds and programs. Schoolwide programs are relieved of many of the requirements of most federal programs, as long as the intent and purpose of those programs are met. Thus, schoolwide programs have the opportunity to define a set of programs, policies and procedures that will most likely result in every child achieving high academic results. Then, a variety of federal and state resources can be combined to find the necessary activities. There is no longer a need for programs to be distinct, separate or categorical.

Schoolwide programs have the opportunity to define a set of programs, policies and procedures that will most likely result in every child achieving high academic results.

The opportunity for coordination does not in any way diminish the responsibility for promoting the academic success of various groups of children. As schools plan schoolwide programs they must first ensure that the needs of migrant students are addressed. Similarly, schools must plan strategies for providing timely additional assistance to students who demonstrate difficulty during the school year in mastering state standards. The new law does not mandate separate programs. However, it does require that schools plan in ways that respond to the unique needs and strengths of all groups of children.

School districts and state agencies have other important opportunities to promote the coordination of funds and programs. They can create consolidated applications that articulate new relationships among various federal programs. School districts can apply to their state education agency to consolidate administrative funds from several federal funding sources. This flexibility enables school districts and state agencies to break down the walls that have separated various special programs from each other and from the general education program. Even in institutions where flexibility has not been explicitly provided in the law, there is broad waiver authority that allows the U.S. Secretary of Education to waive laws and regulations that impede schools as they seek to serve all students well. In essence, educators have the opportunity to refine their focus and renew their commitment to supporting the academic success of all students.

The potential benefits of the *Improving America's Schools Act* (improved achievement for all students) will not appear miraculously on the doorsteps of educators. Teachers, principals, superintendents, parents and other educators will need to work diligently to make good use of the flexibility the law provides. If teachers continue to bemoan the fragmentation of the school day created by a multitude of pull-out programs, it will not be the fault of the federal legislation. If principals cannot access various federal fund sources to support innovative professional development or state-of-the-art technology, or if parents continue to be confused and frustrated with programs that appear duplicative, wasteful and uncoordinated, the problem cannot fairly be attributed to federal regulations. We, as educators, have more flexibility than ever to use our resources to create strong learning environments for all students. It is our challenge and responsibility to use that flexibility well.

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School Finance Reform and Intra-District Equity: An Excerpt

José A. Cárdenas, Ed.D.

Editor's Note: The following is excerpted from "The Status and Future of School Finance Reform," from the book, **Texas School Finance Reform: An IDRA Perspective,** *currently in production. Copies will be available from IDRA by early April 1997 (see Page 17).*

The Status of Reform

Not very long ago, following the funeral of a family member, I happened to be in the company of a group of retired educators. One of them, a friend of many years and former colleague in the Edgewood school district, was commenting on the status of school finance equity. After displaying considerable ignorance of the topic, he commented, "I feel sorry for you and IDRA. After more than 25 years of involvement in school finance, you have accomplished nothing."

I feel that this indictment is too strong. As expressed by Judge F. Scott McCown in his January 1996 revised opinion, "We have come a long way"...

I agree with Judge McCown that we have come a long way. There are still inequalities in the system, and the Texas legislature has not addressed adequately the need for equalized facilities funding. Yet low wealth school districts have improved considerably over the past 46 years since my first horrendous experiences as a teacher, supervisor, principal and superintendent in some of these low wealth districts. The system is not perfect, but it certainly is much better...

In 1995, the U.S. General Accounting Office (GAO) conducted a study on school finance equity for a congressional committee on education. The study focused on three states that experts in education finance identified as having implemented significant school finance equity reform. The three states used in the study were Minnesota, Tennessee and Texas.

The Texas case study analyzes the current system established by Senate Bill 7 (SB7) in 1993, the outcomes of the reform effort and a prognosis for the current system. The following excerpts are from the text of the system's analysis, outcomes and prognosis as found in the GAO report.

> State officials, former legislators, education advocates and others we interviewed were unanimous in saying that the new system had greatly improved equity. They noted that compromises had to be made to increase the level of funding available to poor districts while not forcing school district consolidation across the state, but they said that the amount of progress towards greater equity had been substantial...
>
> While our interviewees cited accomplishments under the new system, they also collectively identified four concerns about inequities in the school finance system re-emerging: (1) the continued heavy reliance on local property taxes, (2) wealthy districts' concerns about sharing their wealth, (3) less wealthy districts' concerns about continued differences in per pupil spending, and (4) districts' inability to meet rising costs...

Equity Sample Analysis

The impact of recent school finance reform legislation can be demonstrated by a study of Bexar County's 12 school districts. Although the number of districts sampled is small and it is difficult to generalize for the entire state, these data are relevant because Bexar County districts provide a wide range of wealth with districts located at the various intervals in the wealth continuum, from very high wealth in the Alamo Heights district, to very low wealth in the Edgewood district.

The "Texas Tax Paradox" of high wealth-low taxation-high yield and low wealth-high taxation-low yield no longer appears to hold true in Bexar County. The only apparent exception is the Somerset school district that has an exceptionally high tax rate with an exceptionally low per pupil expenditure rate, but this exception can be easily explained by the excessive amount of the tax rate (more than 43 percent) dedicated to debt service.

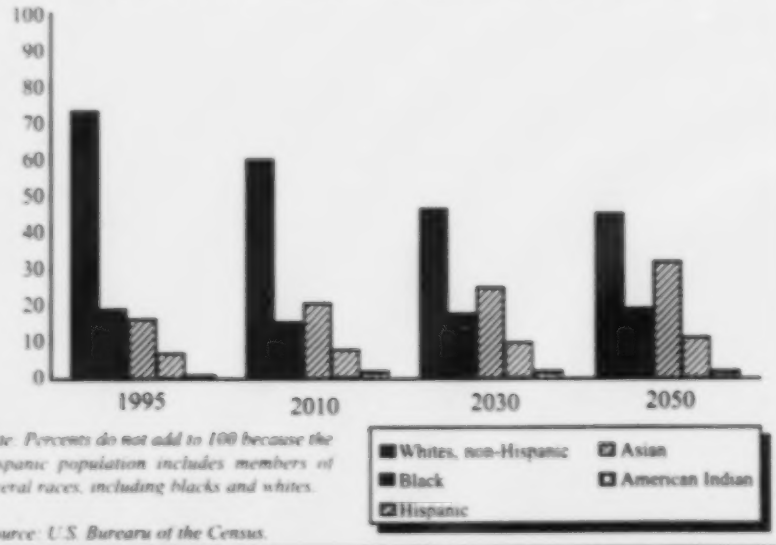
Two statistical analyses were conducted on the data, Pearson Product-Moment coefficients of correlation and an analysis of variance. The correlations derived provide some tentative conclusions about the impact of the school finance reform effort in Bexar County.

***School Finance** - continued on page 12*

Did You Know?

Changing School Population

Projections by the U.S. Bureau of the Census Show That by 2050 One in Four School-Age Children will be Hispanic



Note: Percents do not add to 100 because the Hispanic population includes members of several races, including blacks and whites.

Source: U.S. Bureau of the Census.

School Finance - continued from page 11

The moderate correlation between per pupil expenditures and teacher turnover rates (-0.4241) indicates a moderate tendency for teacher work forces to be more stable in higher expending districts. Although this correlation is only moderate, it does denote a higher correlation than the district wealth, tax rate and percentage disadvantaged variables.

Pertinent to the assessment of the impact of reform legislation is the absolute lack of correlation between district wealth and per pupil expenditures (-0.001). Whereas these two variables had a moderate to high correlation prior to the reform effort (the correlation was 0.6410 in 1976), it is surprising to see its absence in this analysis.

Variations in per pupil expenditures correlate much higher with the percentage of economically disadvantaged students, a result of the use of a weighted student factor in the foundation school program…

Educational Resources Survey

A further determination of the status of school finance reform in Texas was made by an educational resources survey, a "then and now" comparison provided by Dr. Dolores Muñoz, the current superintendent of the Edgewood Independent School District. My description of the deplorable conditions I experienced as teacher, principal and superintendent in Edgewood from 1953 to 1973 were made available to Dr. Muñoz, and she contrasted these descriptions with current conditions in the school district.

Although the superintendent has seen a significant improvement in educational opportunities for the students, she still sees the impact of school finance reform as limited. Providing adequate physical facilities, furniture and equipment is still a major problem. Improvement has been significant; equity is still to be achieved…

Intra-District Equity

In Texas, the school finance reform effort has focused on expenditure disparities between districts. It is naive to assume that similar disparities do not exist within school districts. From personal experience as well as studies of race, ethnic and gender equity, I suspect large discrepancies in funds available in the various sectors of large, urban school districts…

Parents are often interested in obtaining the best educational opportunity for their children. This is not an undesirable attitude. I too have attempted to obtain better educational opportunities for my own children. But when parents attempt to obtain better educational opportunities for their children *at the expense of somebody else's children*, it creates social, moral, legal and political problems.

Texas has gone through a long era of attempting to rectify an inequity problem created by persons who obtained superior educational opportunities for their children at the expense of other children's education and at the expense of other parents' tax efforts. The diminishing of this privileged position by the use of the Equal Protection Clause in the *Edgewood* litigation will probably result in an attempt by the privileged class to seek other ways of perpetuating their privileged position. Intra-district disparities offer such an opportunity. Since the courts and subsequent legislative action have reduced the opportunity for the privileged to attain superior educational opportunities for their children at the expense of children in other school districts, attempts will be made to attain the same superior educational opportunities at the expense of other children in the same school district.

Perhaps the symptoms of such a move are already with us. I note the trend toward block grants to school districts for meeting the special needs of a variety of students. Wide local discretion is provided for the expenditure of these mixed funds. Past experience indicates extensive local competition for these funds, but the students with the most need are also the students with the least political clout and ability to access these funds. Therefore they have received the least in the past and will continue to receive the least in the future. I cannot forget the long line of school superintendents testifying that the proposed requirement that bilingual education funds be used for limited-English-proficient children created an inconvenience to the district since bilingual funds had consistently been used for other non-bilingual purposes. Will the return of local discretion again result in earmarked funds for needy students being used for other purposes?

I also note in a report by the Legislative Budget Board unusual increases in the number of students in higher funded career and technology programs. Is student participation in these programs a cross section of the student population, or is it becoming the domain of an elitist population?

Similar inquiry should be made of the gifted and talented programs, programs that IDRA has always supported. Yet we note that the number of students currently enrolled in these programs has already grown by 37 percent over funding estimates. Actual expenditures in these programs are already 352 percent higher than the legislative allotment. What kind of students are participating in the gifted and talented programs? Where are the funds in excess of the allotment coming from? Are children not identified as gifted or talented being shortchanged by funds from their basic foundation program being used to subsidize a special program for special children? Are inter-district disparities already being replaced by intra-district disparities?

The answers to these questions are unknown, but then, the questions have not even been asked. For many years, intra-district inequities have taken second priority to inter-district inequities, and IDRA staff have patiently waited for the resolution of the first priority before undertaking the second effort. The immediate future should see the beginning of an IDRA research effort to determine if there are significant differences in financial and other educational resources within school districts. Students being shortchanged by the local system is not much different from being shortchanged by the state system.

Dr. José A. Cárdenas is director emeritus and founder of IDRA. Comments and questions may be sent to him via E-mail at idra@idra.org

Upcoming Events

Texas Association for Bilingual Education
26th Annual Conference

October 22-25, 1997
Houston, Texas

For more information, call 1-800-822-3930.

Conference for Parents by Parents
Families United for Education: A Voice for Our Future

April 12, 1997
San Antonio, Texas

For more information, contact IDRA 210/684-8180.

Successful Coordination - continued from page 2

provides a focus, commitment and direction for the school organization. It is the cornerstone for defining the role that the school will play. Goals represent the value-driven purposes and student outcomes to be achieved by the school. In essence, they describe the preparation that students will receive by the time they leave the school system, and the goals must be aligned with the characteristics of a functioning society and workplace. This is particularly important in light of the unacceptable productivity level of the existing educational system. As the role of education changes to align with the demands and dynamism of society and workplace, so must its goals. Furthermore, goals must reflect a commitment to excellence and equity for all student populations.

Goals shape the direction that the schools have chosen and provide tasks that the schools are committed to achieve. They guide all efforts initiated at the different levels of the organization. Consequently, not only must the goals be articulated to the whole community, but also they must be *understood* by the community. The community, on the other hand, must commit itself to work with the school to achieve these goals.

The second dimension, ***well-articulated plan to integrate services***, describes the needs in terms of multiplicity of the factors that contribute to a need and defines the school's multifaceted response. Addressing needs becomes the major objective of school reform or improvement plans. Needs are described in terms of the distance from the existing level of student performance to the expected level of performance as established in the school's goals. Needs must reflect an acknowledgment of the complexity of factors that collectively address the problem of underachievement.

Responses to address these needs must also align with those factors within the purview of the school that define a need. Furthermore, the definition of a need may require services from agencies external to the school organization, such as health services. These responses are then integrated into a holistic, well-articulated plan to combine services that collectively provide a viable solution to complex, multifaceted problems that cause student underachievement.

Students who are considered at risk of dropping out of school or of receiving inappropriate educational services will benefit the most from a well-articulated plan. Students typically considered at-risk are migrant students, limited-English-proficient (LEP) students, underachieving students, economically disadvantaged students, homeless children and children who have behavior problems. The list varies depending on the definition assigned by a state or agency. For example, a plan that coalesces educational services to address the issue of underachievement among the LEP student population focuses on a multiplicity of factors that influence achievement.

The third dimension, ***resourcefulness***, alludes to the skilled orchestration of funds for educational services and to the effectiveness of the administrator in integrating services external to the school. Leveraging is an important attribute of the administrator in the restructured school. *Leveraging* is defined as the ability to "get the most out of the buck." Using funds to acquire funding commitments from other sources is a form of leveraging. Coordinating services to avoid duplication is another form of leveraging. It is also the ability to create and select well thought-out educational programs that yield maximum results in student achievement with minimum financial investment.

Being a fiscally frugal person, a visionary and a risk-taker are the trademarks of resourceful school leaders. They have specific, well-articulated educational plans to increase student achievement, and they have identified the resources that they need in order to accomplish their plans. They take advantage of every opportunity to leverage existing funds to acquire additional funding to implement their plans. They seek external funding and develop partnerships with the community and the business sector. They create an educational environment that fosters collaboration. On their campuses, staff members are clear on their mission, believe in a vision and share specific goals for their students.

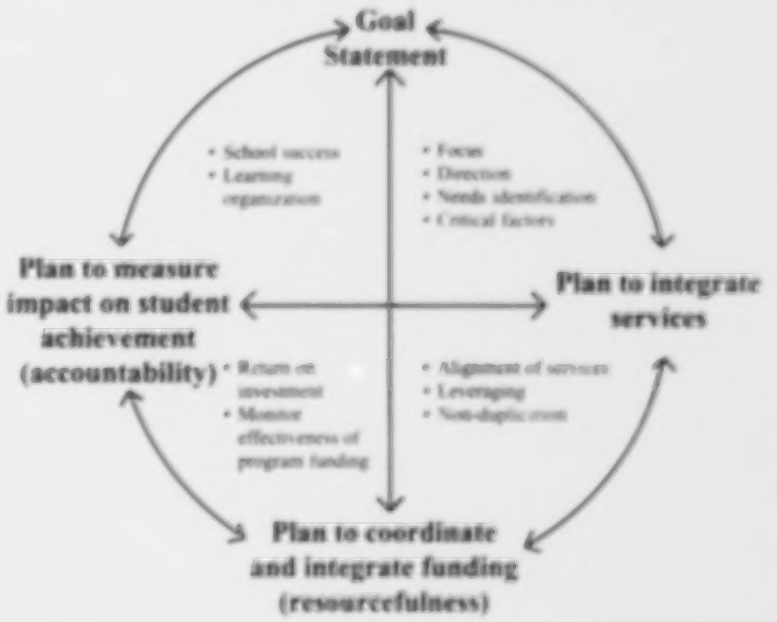
Below are questions that a school may ask when monitoring its resourcefulness:

- Are we equipped to seek external funding?
- Do we coordinate and leverage funds to maximize their impact on student achievement?

The fourth dimension, ***accountability***, refers to the systems in place to monitor and measure impact of integrated services on the achievement of students and goals. A cornerstone of sound fiscal policy is an

Successful Coordination - continued on page 14

FOUR DIMENSIONS OF THE RESTRUCTURING PROCESS



O'Neil, J. "Piecing Together the Restructuring Puzzle," *Education Leadership* (1990), 47:4-10.

Successful Coordination - continued from page 13

accountability system that provides data on the success that schools experience with their educational plans and the soundness of the fiscal policy that supported the educational endeavors.

The accountability system must include a formative evaluation that monitors the decisions and accessibility of funds to support the educational plan. The accountability system will yield data on the effectiveness of existing fiscal policy in providing the resources needed to implement the educational plan. It will provide answers to the following questions:

- Were enough funds made available to implement the educational plan?
- How successful was the school in leveraging existing funds?
- Were all sources of funding tapped?
- How successful was the school in acquiring additional funds?

Researchers Reavis and Griffith reinforce the importance of accountability to a learning organization (1992). A learning organization is one that uses data and is constantly seeking to improve its decision-making ability. It does so by examining results and the decisions made to achieve those results. It monitors availability, coordination and impact of resources.

Being pro-active in ensuring that all four dimensions operate in tandem is critical for the administrator and the site-based committees. To ignore or to address minimally any one dimension negatively affects the other dimensions. For example, focusing on coordination of funds without any connection to the student goals creates an environment where funds are expended on faith with no clear description of expected outcomes. Stakeholders hesitate to support educational endeavors with ill-founded and poorly articulated goals.

Focusing on student goals and neglecting an articulated plan for achieving the goal is like sailing without a compass or a rudder. The destination is clear but how to get there is ambiguous and doubtful. Disregarding a well-defined plan to coordinate services provides little or no justification for the allocation of funds.

A fragmented plan demonstrates a lack of focus and an inability to see organizational relationships among factors that improve student achievement. Consequently, a haphazard disbursement of funds occurs. In this scenario, there will be duplication of services, uncoordinated instructional programs and frustration among educational personnel who fail to see the "big picture" and spend their time trying to solve what they perceive as a puzzle.

Lacking an adequate accountability plan that informs the stakeholders of the funding's impact creates ambiguity and anxiety that leads to a lack of trust and the implementation of measures that limit the authority of the school.

Coordination of funds and programs presents a challenge to the school administrator and site-based committee who must ensure that funds are used and leveraged with maximum outcomes. School staff members must acknowledge the power of the four dimensions of the restructuring process discussed in this article to create the best conditions for the appropriate use of funds. Otherwise...

You can want to do the right thing.
And you can even want to do it for the right reasons.
But if you don't apply the right principles,
You can still hit a wall (Covey, Merrill and Merrill, 1994).

Coming Up!

In April, the *IDRA Newsletter* focuses on teaching and learning.

Two-Way Dual Language Networking Conference

Join teachers, program administrators, teacher educators, technical assistance providers, parents and community members to expand your knowledge and expertise on dual language programs.

Presenters include:
Dr. Virginia Collier, George Mason University
Rosa Molina, San Jose USD, California
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Maria Seidner, Texas Education Agency
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Registration: $75 or $65 early (before March 14). Call 713.892-6500.

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Co-sponsored by Houston Independent School District
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Resources

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Abelardo Villarreal, Ph. D. is director of IDRA's Division of Professional Development. Oanh H. Maroney is a research assistant in the IDRA Division of Research and Evaluation. Comments and questions may be sent to them via E-mail at idra@idra.org.

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All Pianos Have Keys and Other Stories

by Dr. José A. Cárdenas

In a way, this small, 134-page book complements Dr. José Cárdenas' larger *Multicultural Education: A Generation of Advocacy* just published by Simon and Schuster. The multicultural education book is an anthology of 92 professional articles resulting from his 45 years as a professional educator. *All Pianos Have Keys* represents the lighter side of these 45 years.

"The seriousness of my professional life has been paralleled by extensive humor in my personal life. I enjoy a funny story and a good joke," writes Cárdenas in the Preface.

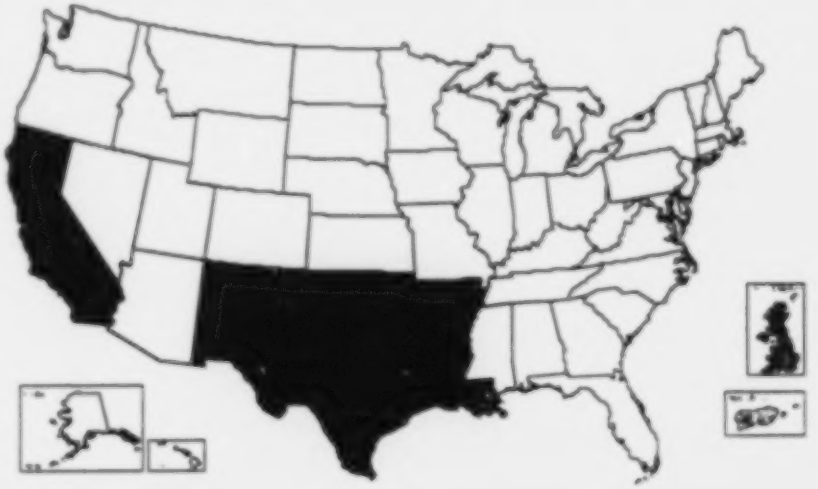
The first eight articles deal with the lighter side of his life. They include personal anecdotes from childhood to adulthood. The second section consists of 12 anecdotes where humor and professional seriousness have intersected. The last section consists of nine articles on a variety of professional topics addressed in a lighter context than is possible in professional publications.

All Pianos Have Keys is distributed exclusively by the Intercultural Development Research Association ($12.70). Contact IDRA at 210/684-8180 or 5835 Callaghan Road, Suite 350, San Antonio, Texas 78228. Fax 210/684-5389. It is IDRA policy that all orders totalling less than $30 be pre-paid.

Highlights of Recent IDRA Activities

In January, IDRA worked with **5,794** teachers, administrators and parents through **59** training and technical assistance activities and **103** program sites in **seven** states plus the United Kingdom. Topics included:

- Conflict Resolution
- *Coca-Cola Valued Youth Program*
- Portfolio Assessment
- Social Studies Strategies in a Bilingual Education Classroom
- *Mobilization for Equity*
- *Project FLAIR* (Focusing on Language and Academic Instructional Renewal)



Participating agencies and school districts include:

- Brownsville ISD, Texas
- Edgewood ISD, Texas
- Cobre CSD, New Mexico
- McAllen ISD, Texas
- San Benito CISD, Texas
- Dallas ISD, Texas

IDRA staff provides services to:

- public school teachers
- parents
- administrators
- other decision-makers in public education

Services include:

- training and technical assistance
- evaluation
- serving as expert witnesses in policy settings and court cases
- publishing research and professional papers, books, videos and curricula.

Activity Snapshot

Beginning this school year, IDRA is working with a large school district in North Texas to increase the cognitive growth and academic achievement for all students, including language minority students, through an intensive language-across-the-curriculum program. Through this reading project, known as Project FLAIR (Focusing on Language and Academic Instructional Renewal), a task force of teachers and administrators at each campus analyzes their instructional program, learns and practices new strategies, evaluates their success and sets goals for the next year. Project FLAIR is expected to positively impact 99 teachers, principals and librarians and 3,500 students at the participating sites this year alone.

For information on IDRA services for your school district or other group, contact IDRA at 210/684-8180.

Property Tax Relief - continued from page 5

property wealthy districts that could be used in the future and would further expand spending disparities, particularly if future tax increases made by districts occur at tax levels above where equalization funding is provided (above $1.50).

Above the $1.50 tax effort, the state does not provide additional funding. If local schools were to use the cushion created by providing state monies to replace local taxes, high wealth school districts could choose to increase debt service taxes and raise millions of local tax dollars that would be totally unequalized, bringing into question the whole legitimacy of the existing system.

Proponents of the plan argue that such a dollar-per-dollar replacement will not create any *further* inequity in the system than currently exists. While this is true, it will cost the state an estimated $1.6 million per two-year funding cycle to replace the local property tax revenue reductions in local schools. IDRA and other equalization proponents believe that the state funding would be better spent if it were directed toward increasing funding for programs and facilities that provide excellence and equity in education for all students.

Other Possibilities

Other means are available for the state to provide tax relief to residents in the state's highest taxing school systems and, at the same time, use available state money to create equity in the school funding system.

On the equity issue, putting the surplus state money into an increase in Tier II Guaranteed Yield funding would significantly reduce the disparities remaining in the present system. By increasing the guaranteed level from the current $21 to $28, the differences in yield within the current system would be effectively neutralized, thus providing equal return for equal tax effort across Texas school systems.

A second option, that could be used by itself or in combination with the increased Tier II funding, involves providing tax relief on the basis of existing total tax effort – with the local districts exerting the greatest effort receiving the most relief. To ensure that such an approach has no dis-equalizing effects, state funding could in turn be adjusted based on the property tax level per pupil of eligible school systems.

A third option mentioned in recent legislative hearings involves increasing the amount of money districts would be guaranteed for each cent of tax effort. Since several districts can get the same total revenue with different tax rates, the legislature could mandate that some of the local property tax money used to fund local schools be returned to taxpayers in the form of tax relief.

Though not intended to be all-inclusive, these alternatives demonstrate that the state has a variety of options available that can actually improve the quality of local schools, promote equalization and provide tax relief for local property owners.

At this writing, reaction to the governor's plan are beginning to emerge, and alternatives to and variations of the property tax relief concepts are beginning to develop. IDRA will continue to monitor developments in this area and keep *IDRA Newsletter* readers advised of significant developments.

Resources

Clark, C. and A. Priskac and B. Walker. *Educational Finance Briefing Paper: Texas Public School Finance and Related Issues* (Austin, Texas: Texas Center for Educational Research, 1995).

Albert Cortez, Ph.D., is the director of the IDRA Institute for Policy and Leadership. Comments and questions may be sent to him via E-mail at idra@idra.org.

Texas School Finance Reform
by Dr. José A. Cárdenas
Publication Order Form

This 28-year history of school finance reform in Texas will be distributed exclusively by IDRA (see next page). A limited number of copies are to be printed. Orders are now being accepted at the pre-publication price of $25, including shipping and handling.

To reserve your copy, send this order form and a check or purchase order (if applicable) for $25 to IDRA, 5835 Callaghan Road, Suite 350, San Antonio, Texas 78228; 210/684-8180; fax 210/684-5389. Make sure to include this form when ordering.

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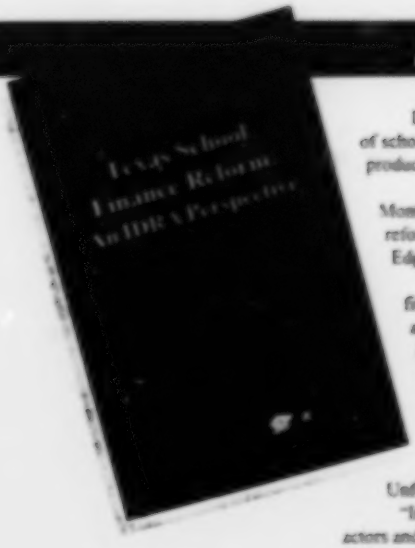
IDRA Publishes School Finance Reform Book



Dr. Jose A. Cárdenas, founder and director emeritus of IDRA, has completed a new book on the 28-year history of school finance in Texas. The new publication, *Texas School Finance Reform: An IDRA Perspective*, is currently in production and will be ready for distribution early in 1997.

"José is the best qualified person to author this history of school finance reform," said Dr. Maria Robledo Montecel, executive director of IDRA. "He is the only person who has been actively involved in the entire school finance reform effort since the early days of the *Rodriguez vs. San Antonio ISD* litigation, when he was superintendent of the Edgewood Independent School District, to the present post-*Edgewood* legislation."

Following the U.S. Supreme Court reversal of the *Rodriguez* decision that found the Texas system of school finance unconstitutional in 1973, Dr. Cárdenas resigned from Edgewood to establish a non-profit organization to advocate for school finance reform. The original organization, Texans for Educational Excellence (TEE), re-incorporated in 1974 as the Intercultural Development Research Association (IDRA). Staff from the organization participated in each reform study group, attended each session of the Texas Legislature and provided research data and testimony during litigation in the state courts. Dr. Cárdenas also served as co-master for the court in the design of an equitable system to be used if the legislature failed to enact one.

Judging by the number of inquiries received at IDRA, historians, sociologists, political scientists and educators have a strong interest concerning the who, what, when and how of the Texas school reform. Unfortunately, there is little public information available on the catalytic forces responsible for the reform.

"In the absence of accurate information, a substantial amount of erroneous information is surfacing concerning actors and roles during the period of reform," said Cárdenas. "Persons who performed trivial roles are being credited with leadership roles; persons who made substantial contributions are being ignored."

The author's recollections, impressions and opinions are strongly substantiated by an IDRA collection of documents compiled during the entire 28-year period. IDRA hopes that this information will be useful not only for historical purposes, but also that it will provide a blueprint for persons interested in bringing about future reform in schools and other social institutions.

This 28-year history of school finance reform in Texas will be distributed exclusively by IDRA. A limited number of copies are to be printed. Orders are now being accepted at the pre-publication price of $25, including shipping and handling. *See order form on page 16.*

Selected Quotes from the Book

School Finance Reform

"In retrospect, I can only say that I'm grateful that nobody was opposed to the equitable system since it took 22 additional years, including 10 years of additional litigation, to achieve an only partially equitable system. If there had been real opposition, it may have taken several hundred years to get there."

"Low-wealth school districts may have a problem with a program that provides resources on the basis of gains, when the major impediment to making gains is the lack of resources."

The Edgewood Schools

"The students had drawn typewriter keyboards on pieces of cardboard and were practicing their typing on non-existing typewriters, their fingers hitting the place in the cardboard where the letters were depicted."

School Finance Study Groups

"Projections for other low-wealth districts did not look too promising, but the blue ribbon panel, in its infinite wisdom, added a 'hold harmless' provision. This thoughtful provision prevents poor school districts from receiving less state aid in the first year of implementation than they received before the reform recommendations."

Taxation

"California tax opponent Howard Jarvis gladly came to Texas 'which ranked 49th in tax effort' and provided his experience, expertise and support to a similar effort in this state, an exceptional example of a man with a solution in search of a problem."

"If the legislators allow the courts to close the schools, 3.5 million kids will be sent home. It would be only a matter of days before the Texas electorate would realize that there are worse things in life than taxation."

School Finance Legislation

"Gov. Briscoe promptly called two special sessions to deal with property taxation. The first session was followed by a second session to correct the mistakes of the first session."

School Finance Litigation

"If one asks what Gov. Dolph Briscoe was thinking concerning *Rodriguez* in the period between the three-judge decision and the Supreme Court decision (15 months), the closest answer is that he was not."

School Facilities

"The findings of the experts [on school facilities needs] were so embarrassing and created such a legal liability for the state that the study was never released by the governor."

Future Issues

"Since the courts and subsequent legislative action have reduced the opportunity for the privileged to attain superior educational opportunities for their children at the expense of children in other school districts, attempts will be made to attain the same superior educational opportunities at the expense of other children in the same school district."

Contents

Foreword by Dr. James A. Kelly, president, National Board of Professional Teaching Standards

1. The Texas System: 1950 to 1973
2. *Rodriguez vs. San Antonio ISD*
3. Post *Rodriguez*: 1973 to 1985
4. State Legislation: 1973 to 1984
5. Bilingual Education Funding
6. Property Tax Equity: 1973 to 1995
7. The Perot Committee and House Bill 72
8. The *Edgewood* Litigation
9. Senate Bill 1 and *Edgewood II*
10. Senate Bill 351 and *Edgewood III*
11. Aftermath, Senate Bill 7 and *Edgewood IV*
12. The Status and Future of School Finance Reform

The text is augmented by a bibliography including 159 references on school finance and a listing of 142 court case citations. The index includes page locations for 280 individuals, 157 organizations, agencies and institutions, 62 legislative bills, 88 court cases, and 274 school finance topics mentioned in the 12 chapters.

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Fourth Annual IDRA

La Semana del Niño

The Week of the Young Child

Early Childhood Educator's Institute™

April 21 through April 24, 1997
Omni San Antonio Hotel • San Antonio, Texas
Presented by: Intercultural Development Research Association

Explore new skills and insights through exciting sessions featuring early childhood experts and field trips showcasing innovative programs for the youngest of diverse learners. This professional development event, open to early childhood educators, administrators and parents, promises to be an informative, interesting and fun-filled experience.

Statewide Videoconference

In addition to the institute in San Antonio, educators and administrators from across the state will come together through special sessions on early childhood education methods and practices via a statewide videoconference. Its theme is "Critical Early Childhood Issues for the Year 2000 and Beyond: Supporting Families and Children Through Excellence," and it will be held on Wednesday afternoon, 2:00 to 4:00 CST. Contact Yojani Hernández at IDRA for details, 210/684-8180.

This year's theme is windows (Weaving Innovative Notions and Diverse Opportunities for Wee Scholars). Come and open new windows to the following areas:

- ✔ **Children's literature,** with an emphasis on diversity
- ✔ **School restructuring,** considering strategies that have been proven to improve literacy
- ✔ **Instructional strategies** in mathematics, science, play and technology
- ✔ **Parental involvement,** with sessions designed for parents and parent liaisons at the campus or district levels

An Evening With Gary Soto

Join us for a special reception on Monday evening with Gary Soto, renowned author of numerous books and poetry collections. Soto is perhaps best known among early childhood education circles for his book, *Too Many Tamales*. Together, his books for adults and young people have sold more than one million copies. In addition to speaking at the reception, Soto will be available Monday evening for book signing and will lead a workshop Tuesday morning.

- Meet well-known personalities in the area of children's literature who write about the experiences of diverse children.
- Learn the latest about restructuring in early childhood classrooms, such as multi-age settings, cross-age tutoring and dual language programs for the very young.
- Take home activities you've practiced through hands-on sessions in play, fine arts, technology, mathematics and science with a variety of practitioners and IDRA's very own experts in these fields.
- Visit nationally recognized early childhood centers to see innovative child-centered activities that are successful.
- Find out what's new in parent involvement either through sessions designed for parents by parents, or for parent liaisons responsible for building capacity, writing parent-campus compacts and enhancing overall parent participation at the district level.
- Take home a notebook full of ideas to use right away in your classroom.
- Become part of an early childhood education network to focus on issues facing the youngest of diverse learners.

$150 (or $130 per team member) before March 27 • $175 after March 27 • $75 single day • $15 reception only

Sponsored by the Intercultural Development Research Association. Supporting IDRA projects include the Desegregation Assistance Center - South Central Collaborative and the STAR Center (the comprehensive regional assistance center that serves Texas via a collaboration of IDRA, the Dana Center at UT Austin and RMC Research Corporation). Each of these IDRA projects provides specialized training and technical assistance to public schools. Information on how your campus can use these resources to improve instruction and assessment will be available at the institute and may also be obtained by calling IDRA at 210/684-8180. Additional support has been provided by AVANCE and Parent-Child, Inc. Teams must have at least three members.

For more information or a registration brochure contact Hilana Bauer or Carol Chavez at IDRA, 210/684-8180; E-mail: idra@idra.org

Analysis of Educational Equity: Community Seeks Direction for Diversity

María Robledo Montecel, Ph.D.

The City Council of Farmers Branch and the Carrollton-Farmers Branch Independent School District (ISD) board of trustees are two discrete elected policy-making bodies facing the same powerful educational, economic and demographic forces. Both are trying to make decisions that will enable them to meet their public responsibilities with wisdom, integrity and effectiveness.

In another time, in the rural and even the postwar suburban era of Carrollton-Farmers Branch, each entity could have comfortably made those decisions without concern for their effect on the ability of the other to uphold their public trust. But the city of Farmers Branch and the Carrollton-Farmers Branch school district are right in the middle of rapid and constant economic, educational and demographic transformations that require that each attend and contribute to the quality of information, input and decision making of the other.

A study by IDRA grew out of the concern of the Farmers Branch city council (and a broad spectrum of members of the Farmers Branch community) that the proposed school attendance zones contemplated by the Carrollton-Farmers Branch school district have the potential to exacerbate pressures on the school and the community that would lead to a decline in the quality of education in the schools serving Farmers Branch students. The city of Farmers Branch has concerns about access, equity and excellence (effectiveness) and how the decisions made for constructing new schools and the proposed attendance zones will affect these. This study was commissioned to assist the city in preparing a set of recommendations that reflects a broad spectrum of involved voices from the community and includes choices broader than those the school sees as its current options.

IDRA and a team of researchers interviewed 14 key stakeholders individually and convened 29 others in focus groups.

The size and diversity of the community has changed dramatically in the last 17 years. The district has a good reputation in the state. Because of the shifting population trends, there are some campuses in which minorities are the majority and other campuses with high concentrations of low-income populations. There is concern among some community residents that the quality of offerings and reputations of the schools will suffer.

Many respondents feel that a downward economic spiral will ensue if the concentrations of students that the population shifts are bringing dominate any campus.

The community interviewed wants diversity and sees diversity as a positive value. Key stakeholders unanimously support diversity, equity and excellence in the community and the district. There is also strong support for redrawing attendance zones to facilitate diversity at all levels.

IDRA included in the study a review of what the law and the courts state including:

- Separate public schooling is inherently unequal.
- The school district bears the primary responsibility for achieving and maintaining desegregated schools.

In addition to interviews, the research team acquired selected student achievement and participation data and compiled data sets focusing on attendance zone demographics. Highlights of the findings are listed below.

Equitable student assignment to schools...

- In the past 17 years, the numbers of students, minority students and low-income students have almost doubled.

Equitable student access to programs and services...

- Only 7 percent of the students in gifted and talented programs are Hispanic and 2 percent are African American, even though these students make up 24 percent and 8 percent of the student population, respectively.
- Students who bring to school a language other than English constitute almost 13 percent of the district's population, the same percentage of such children in the state. District results for these children lag behind the state in reading, mathematics and all tests; the higher the grade level, the bigger the gap.

Faculty staffing...

- Only one in 10 teachers is minority.

Quality of educational programs...

- While the overall TAAS performance of students is impressive and reflects the local schools' trend of meeting or exceeding state average performance levels, there are gaps in the academic performance levels of different subgroups of pupils.
- Hispanic students in the Carrollton-Farmers Branch ISD high schools dropped out in greater numbers than did other students within the district.
- Review of the data indicates that the use of the proposed attendance zones will tend to concentrate the future high school minority population that is currently 57 percent White and 43 percent minority.
- The proposed attendance zone configuration would result in one high school zone having the most minority students and the least experienced teachers from feeder elementary schools.
- The schools with the greatest percentages of low-income pupils are grouped within the proposed new attendance zone.

In sum, property values can be protected for all sectors of the community if the criterion used for assigning children to schools is not limited to "neighborhood schools." A downward economic spiral evidenced in some neighborhoods will affect the whole district if schools only reflect the economic conditions of the immediate neighborhood. There has been a lack of inclusion of members of minority groups in the formal and informal decision making-process.

Based on the results of the interviews and data analysis, a series of recommendations was developed. IDRA presented research findings and recommendations to the City Council of Farmers Branch and the Carrollton-Farmers Branch Independent School District board of trustees. The recommendations represented a spectrum of solutions, from changing the current decisions of where the new school will be located, to re-drawing the attendance zones, to considering the offerings and configurations of all the current and planned high schools. Highlights of the recommendations include the following:

Analysis of Equity *- continued on page 20*

Analysis of Equity - continued from page 19

Climate for decision making

- Affirm responsibility for all children in the district.
- Recognize the human capital and personal assets represented in the new population groups in the district.
- Examine and consider the effects of decisions on diverse groups.
- Underscore future collaboration with the principles of shared responsibility and the interrelated consequences of decision making.
- Look for innovative solutions to atypical problems.

Shaping of attendance zones

- Ensure that the new attendance zones will do no harm to the district's school communities and ensure that attendance zone decisions do not exacerbate the ethnic and socio-economic level identifiability of any school.
- Consider alternative attendance zones presented in the report.

Program enhancement

- Transform a certain high school and its feeder middle schools into a "Global Technologies Academy."
- Create a corporate community college fund for children in low-income families.
- Improve the district's capacity to identify and serve high ability and gifted and talented children from minority and low-income backgrounds.
- Improve the district's capacity to ensure success for children who bring to schools a language other than English.

Staff enhancement

- Maintain high quality, experienced teachers in the schools with the greatest needs.
- Recruit and retain high quality minority teachers and administrators who are strategically engaged in helping the district address the needs of minority students.
- Collaborate with area universities and training organizations on programs to strengthen the capacity of working with changing demographics.

Community building and leadership development

- Explore alternative models of community building and leadership development to ensure minority parents are meaningfully engaged in decision making.

Enhanced city and business community support

- Consider annexing the land on which a certain high school now sits.
- Form a task force of corporate sector representatives with chambers of commerce and other organizations to support the schools instructionally and programmatically.

Since receiving the results of the study the city council and school board have gone through several stages to address the study's findings and recommendations. These stages have included limited public forums, U.S. Department of Justice mediation and steps toward possible litigation. The Carrollton-Farmers Branch community has taken on some tough questions, and this study shows that members of the community are ready for innovative ideas. By working collaboratively with a common vision, the community can address these questions in positive ways that assure equity and success for all children in the district and in ways that maintain the community's economic viability.

Dr. Maria Robledo Montecel is the executive director of IDRA. Comments and questions may be sent to her via E-mail at idra@idra.org. This article is a summary of the key findings and recommendations of the report submitted by IDRA to the City Council of Farmers Branch.

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